



## Marketer FAQs

***“How will the aging of the linear TV audience impact my buying strategy?”***

**Although Adults 50+ comprise nearly half the adult population, many marketers continue to buy TV against traditional 25-54 or 18-49 demos, requiring a shift in strategy.**



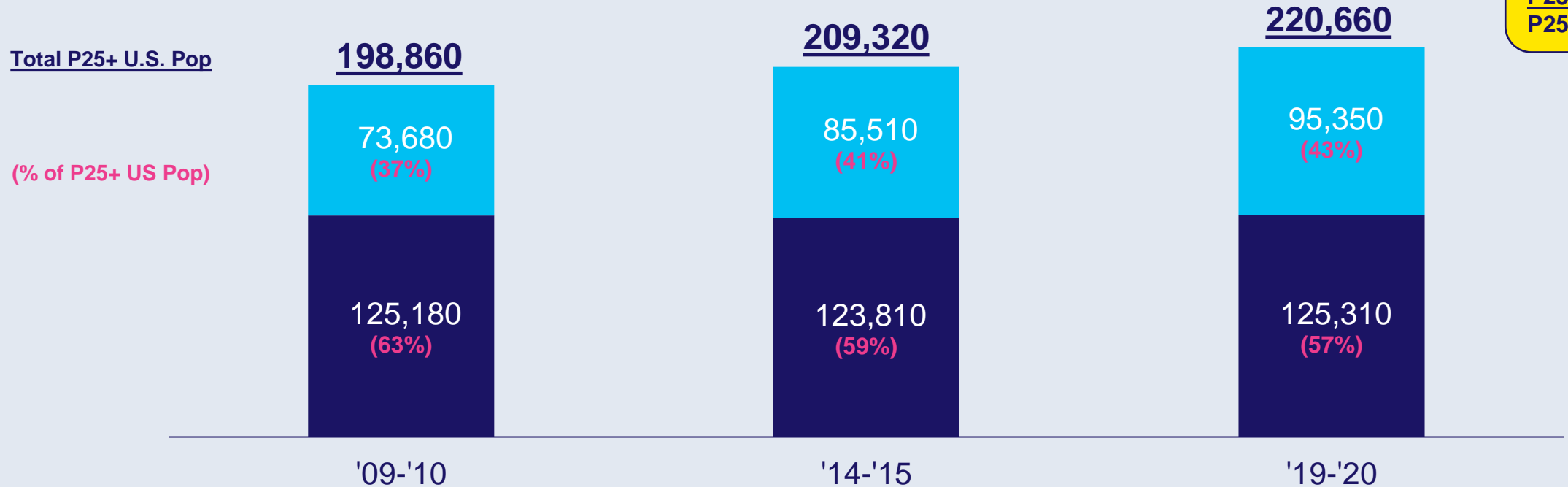
# In the last 10 years, nearly 22 million adults have aged out of the 25-54 buying demo

▶ There was virtually no replacement for those adults by the younger population entering the demo

## U.S. Population by Demo

Broadcast Years

■ P25-54 ■ P55+

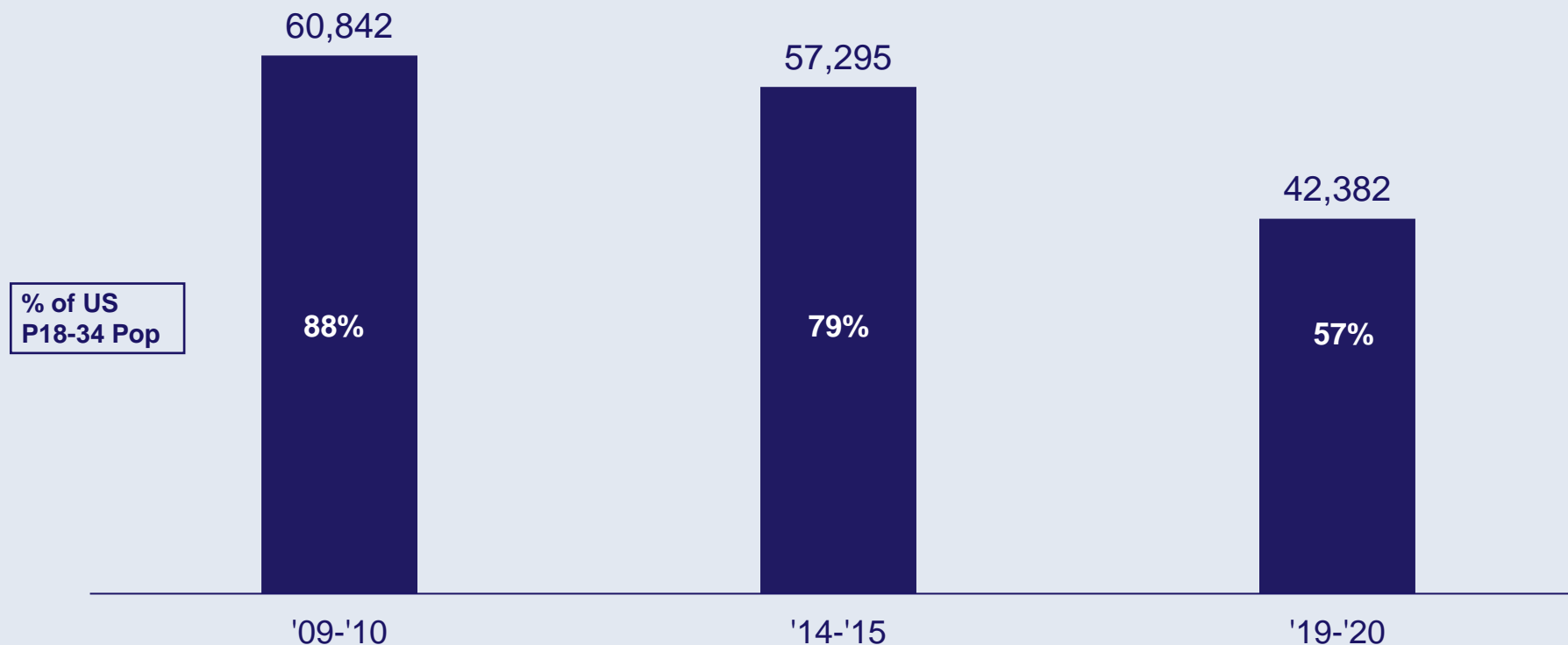


**'19 vs '09**  
 P55+: +21.7MM  
 P25-54: +0.1MM  
 P25+: +21.8MM

Source: VAB analysis of Nielsen Universe Estimates data, Total U.S., Base: P25+, years reflect that following: 8/31/09-8/29/10, 9/1/14-8/30/15 & 8/26/19-8/30/20.

# In addition, 18 million adults 18-34 have cut the cord, lowering penetration to 57%

## Cable + DBS 18-34 Subscribers



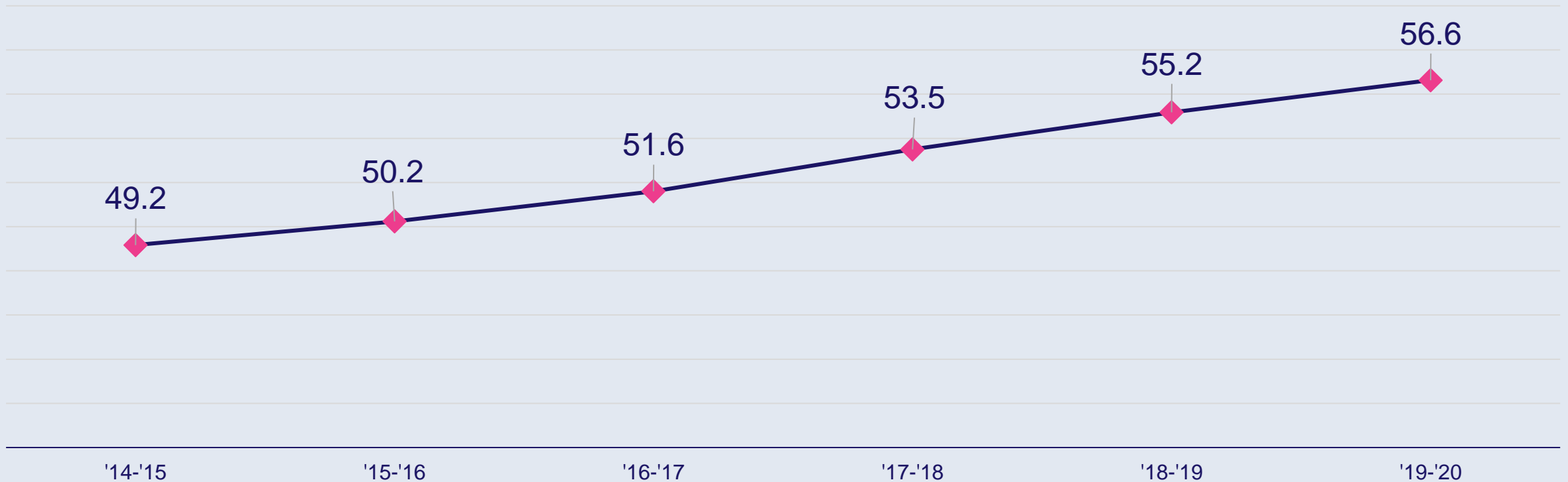
Source: VAB analysis of Nielsen Universe Estimates data, Total U.S., Market Breaks (Cable + DBS), Base: P18+, years reflect that following: 8/31/09-8/29/10, 9/1/14-8/30/15 & 8/26/19-8/30/20.

# Therefore, it's no surprise, the linear TV viewer is aging

► Over the past 5 years, the average age of the national TV viewer has increased by 7 years

## Weighted Average Median Age By Year: Ad-Supported National TV

Live+7, Broadcast Years



Source: VAB analysis of Nielsen Ratings Analysis Time Period Report data , National TV (broadcast TV and cable TV including Spanish language networks), Live+7, Total Day, P2+, Broadcast Years represent: 9/22/14-9/20/15, 9/21/15-9/18/16, 9/19/16-9/24/17, 9/25/17-9/23/18, 9/24/18-9/22/19, 9/23/19-5/31/20 (YTD based on when analysis was conducted). Note: median ages by network were weighted on average viewership and network duration in order to formulate an overall weighted average median age across media.

# With the combination of an aging population and cord cutting, 61% of TV ad impressions are delivered against adults 55+

## % Demo Share of National TV P18+ Equivalized IMPs

C3, Broadcast Years

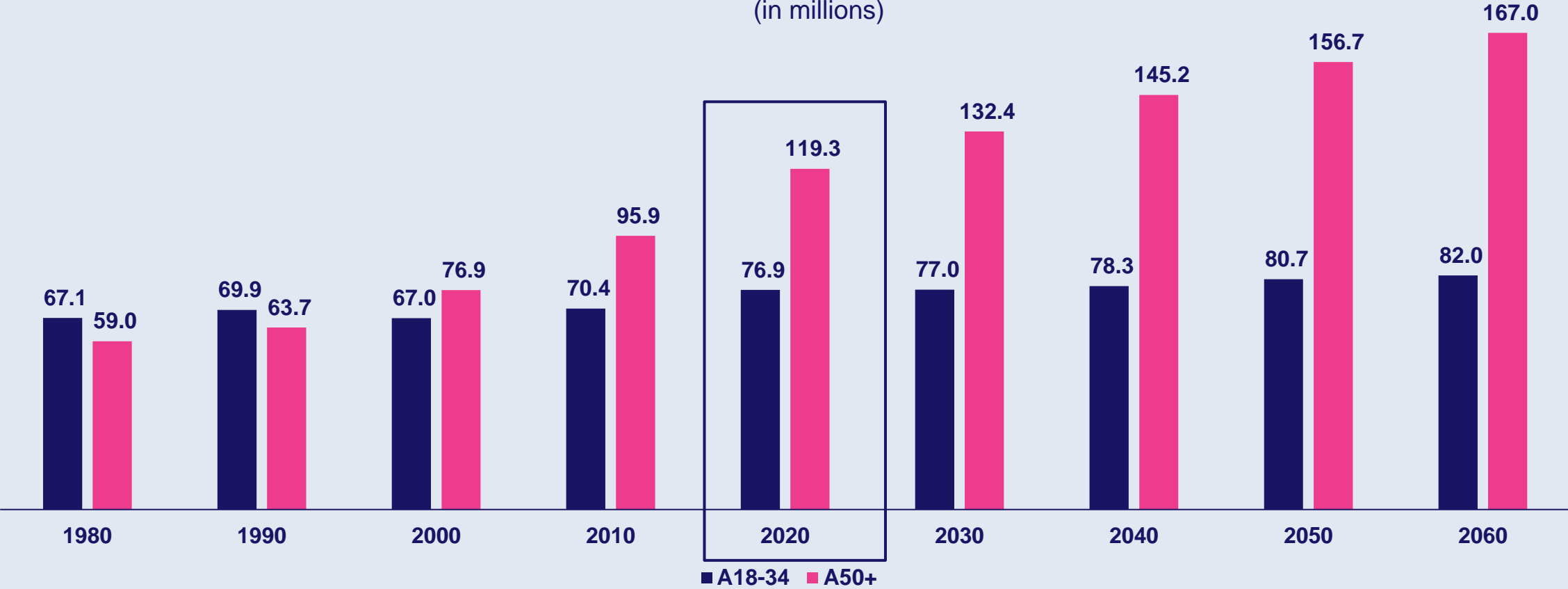


Source: VAB analysis of Nielsen Ad Intel data. National TV (broadcast TV, cable TV), Total Day, All Genres, C3, excludes Promos / PSAs / Local Avails, Broadcast Years represent: 9/22/14-9/20/15 & 9/23/19-5/31/20 (YTD based on when analysis was conducted). Base: P18+. Note: C3 stream does not include Spanish-Language network data.

# And yet, many brands continue to fixate on adults 18-34 while ignoring the fast-growing adult 50+ segment

► By the end of 2020, there will be over 42 million more A50+ than A18-34, and by 2030 that gap will increase to over 55 million

A18-34 & A50+ Actual & Projected U.S. Population  
(in millions)



Source: VAB analysis of U.S. Census Bureau data, Population Estimates for 1980, 1990, 2000, 2010; U.S. Census Bureau, Population Division: Washington, DC., *Projected Age Groups and Sex Composition of the Population: Main Projections Series for the United States, 2017-2060*.

# Presenting an opportunity for marketers, adults 50+ often feel they are underrepresented, misrepresented or ignored by advertisers

**78%**

say that they felt their age group was underrepresented and misrepresented in advertising

**77%**

of 50-59-year-olds feel that their age group is most ignored by advertisers

**62%**

believe that they are ignored because advertisers are too young to understand their market

**49%**

Avoid brands who actively ignore their age group



Source: Gransnet, *Ageism in Advertising: Fighting Marketing's Unconscious Bias*, 2018.

# With sophisticated consumer profiles and 1st party data, savvy marketers understand *age isn't what defines their customer*

Marketers can now buy on buying habits or viewing behavior (programs, genres watched) which is a more accurate surrogate for their customer than a prescribed age bucket

## Buying Habits



In-Market Car Buyers



Frequent Travelers



Pet Owners



Casual Diners



Recent Homeowner



Wine Drinkers



Fast Food Regulars



Financial Planners

## TV Viewing Behaviors



Sports



Drama



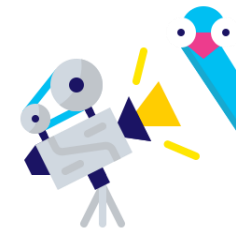
Comedy



News



Award Shows

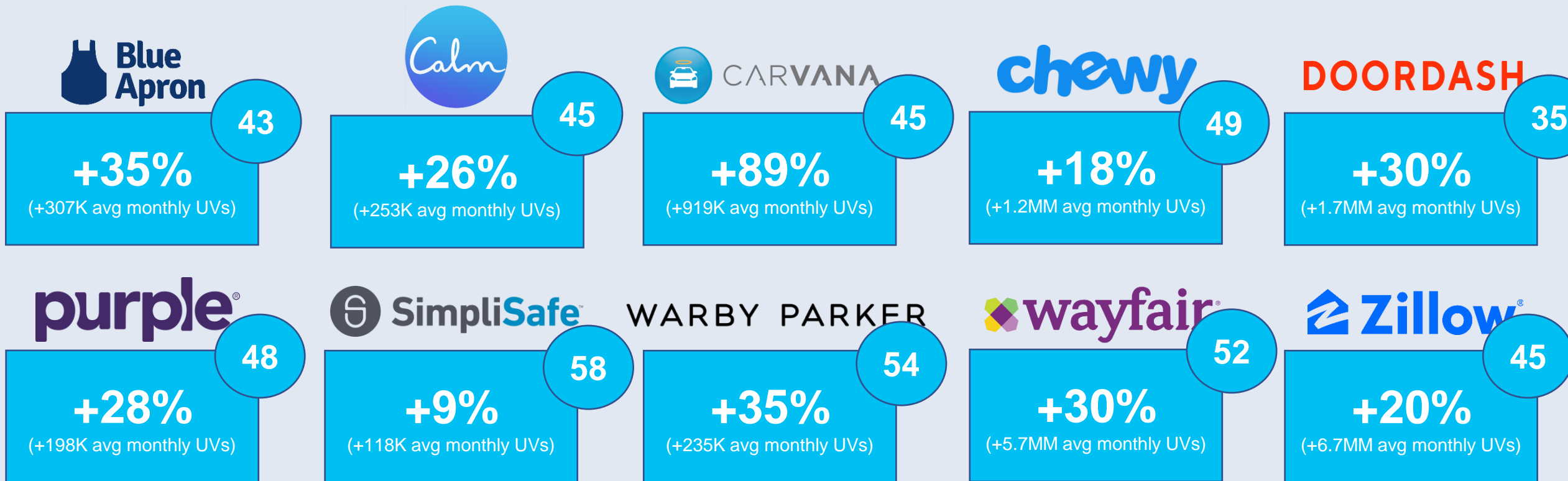


Documentaries

# Who is doing it right? Adults 50+ have been flocking to direct-to-consumer brands' digital platforms during the pandemic; brands that are also significant spenders on TV

## Average monthly unique adult 50+ visitors increase and median age by digital platform

6-month average YoY comparison: Apr-Sep '19 vs. Apr-Sep '20 / Median Age in September 2020



Source: VAB analysis of Comscore MediaMetrix Media Trend multiplatform (desktop + mobile) data, April 2019 – September 2019 vs. April 2020 – September 2020, P50+, total digital population, total monthly unique visitors/viewers. Percentages = average monthly unique visitors increase between the two 6-month time periods.; VAB analysis of Comscore MediaMetrix Media Trend multiplatform (desktop + mobile) data, September 2020. Base: P18+, total digital population, median adult age.

# Implications for Marketers

- ▶ Adhering to traditional age and gender buying demos is misaligned with the realities of the viewing population and requires a fresh look.
- ▶ Marketers that shift their buying approach beyond the demo to adopt an audience-first approach can more precisely target current & potential buyers.

# Other Marketer FAQs Addressed by *Audience Migration in Context*

- ▶ I know the population is aging, but to what extent is it skewing to adults over 50?
- ▶ How lucrative are adults over 50 as a consumer group?
- ▶ Is marketing to adults over 50 relevant for only certain product categories?



## About the Marketer's Guide:

[\*Audience Migration in Context\*](#) is an eye-opening look at the changes in population dynamics. It exposes the disconnect between these population shifts and how many marketers buy TV. It also clearly demonstrates the significant revenue opportunity not realized by brands who are limiting themselves by purchasing on traditional age and sex demographics. These findings underscore how important it is for brands to adopt an audience-first buying approach so that they can reach all potential customers and maximize outcomes

# About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.



We are committed to your business growth and proud to offer VAB members, brand marketers and agencies **complimentary access** to our continuously-growing Insights library. **Get immediate access at [theVAB.com](https://theVAB.com).**

